General Information

| Task	Process Information
Using the Purchase Order (Search PCA) Page	The **Purchase Order (Search PCA)** page can be used to assist in the PO Close Request process. Use the **Purchase Order (Search PCA)** to help identify POs that have NOT been 'Dispatched' which may include the following: 1) POs created in GEARS by mistake or no longer needed 2) POs with PO Status (Approved, Canceled, Denied, Open, Pending Approval/Cancelation) 3) POs with Budget Error After you have identified POs that have NOT been Dispatched that are eligible to be closed, notify DPCA (Procurement) which POs should be closed (via email to DPCA). Procurement will then close the requested POs and any associated Requisitions.

GEARS Navigation

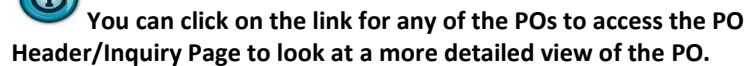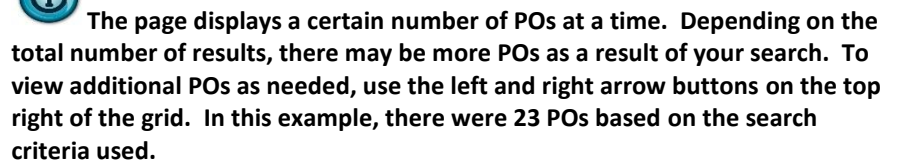|	
Purchasing > Purchase Orders > Review PO Information > Purchase Orders (Search PCA)	Favorites Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders (Search PCA)

1.0   Process

This document is intended to provide a quick reference to using the Purchase Order (Search PCA) Page within GEARS.

STEP	ACTION	DETAILS
1.	**Specify the PO Selection Parameters.** Select the criteria for your PO selection, and then click [Search]. (i) To select POs that have **NOT** been 'Dispatched' for your PCA, enter parameters in the Program Cost Account (PCA) and PO Status fields. You should run a search and analyze PO results by the following PO Status: Approved, Canceled, Denied, Initial, Line Denied, Open, Pending Approval/Approved, Pending Cancel. **Note**: POs with PO Status 'Complete' are already closed in GEARS.	**Purchase Orders (Search PCA)** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value ▼ Search Criteria Business Unit: = ▼ MDJUD PO ID: begins with ▼ Contract SetID: begins with ▼ Contract ID: begins with ▼ Release Number: = ▼ Purchase Order Date: = ▼ PO Status: = ▼ Program Cost Account: begins with ▼ Vendor ID: begins with ▼ Vendor Name: begins with ▼ Buyer: begins with ▼ Buyer Name: begins with ▼ ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria (i) To view POs in your PCA including all PO Statuses, **except** those POs that have already been closed or dispatched, use the following parameters. Enter your PCA number in the 'Program Cost Account' field. Set the PO Status drop down to 'in', Hold the CTRL key and select Approved, Canceled, Denied, Initial, Line Denied, Open, Pending Approval/Approved, and Pending Cancel. **Purchase Orders (Search PCA)** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value ▼ Search Criteria Business Unit: = ▼ MDJUD PO ID: begins with ▼ Contract SetID: begins with ▼ Contract ID: begins with ▼ Release Number: = ▼ Purchase Order Date: = ▼ PO Status: in ▼ Approved / Canceled / Complete / Denied / Dispatched / Initial / Line Denied / Open / Pending Approval/Approved / Pending Cancel Program Cost Account: begins with ▼ 40801 Vendor ID: begins with ▼ Vendor Name: begins with ▼ Buyer: begins with ▼ Buyer Name: begins with ▼ ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria

2.	**The results from your search criteria display the following fields:** PO ID, Contract ID, Release Number, PO Date, PO Status, Program Cost Account (PCA), Vendor ID, Vendor Name, Buyer, PO Type, Purchase Order Reference, Hold From Further Processing.

ⓘ **The page displays a certain number of POs at a time. Depending on the total number of results, there may be more POs as a result of your search. To view additional POs as needed, use the left and right arrow buttons on the top right of the grid. In this example, there were 23 POs based on the search criteria used.**

Note: Make note of any POs that are eligible to be closed. Submit an email to DPCA (Procurement) with a list of POs to be closed.

ⓘ **You can click on the link for any of the POs to access the PO Header/Inquiry Page to look at a more detailed view of the PO.**

ⓘ **After you have reviewed details of the PO. Click the** [Return to Search] **button to return to PO Selection results.**

| 3. | If there were no results from the PO selection criteria, the system will return the message,

 " No matching values were found. ".

 In this example, the search parameters included, PO Status 'Approved' and PCA '40801'. At the time of running the search, there were no POs with 'Approved' status for that PCA. | **Purchase Orders (Search PCA)**
 Enter any information you have and click Search. Leave fields blank for a list of all values.

 Find an Existing Value

 Search Criteria

 Business Unit: = ▼ MDJUD
 PO ID: begins with ▼
 Contract SetID: begins with ▼
 Contract ID: begins with ▼
 Release Number: = ▼
 Purchase Order Date: = ▼
 PO Status: = ▼ Approved ▼
 Program Cost Account: begins with ▼ 40801
 Vendor ID: begins with ▼
 Vendor Name: begins with ▼
 Buyer: begins with ▼
 Buyer Name: begins with ▼
 ☐ Case Sensitive

 Search   Clear   Basic Search   Save Search Criteria

 No matching values were found. |

Important

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.